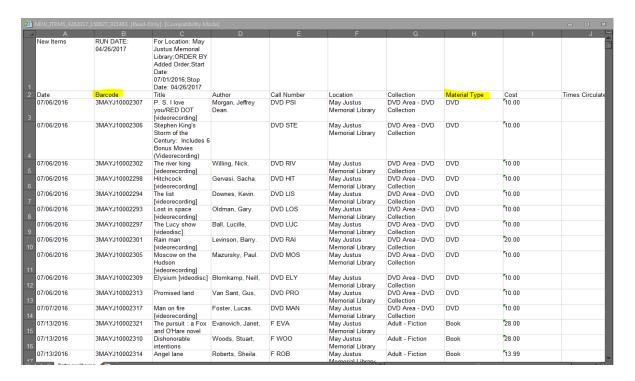
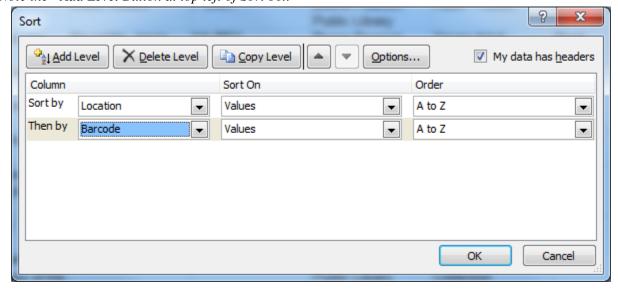
# Working with the New Item Activity Report in Excel

1. Once your report is open in Excel, you will need to sort the data to determine by barcode the number of items added regionally and locally. You will also need this information filtered to determine the number added by Material Type.

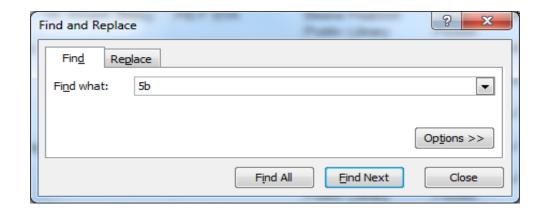


- 2. The first step is to highlight Row 1 and right click to delete the entire row. This is only a report title and the cells get in the way and cause added confusion.
- 3. At the top right of the Ribbon, use the Sort and Filter button. Choose Custom Sort. Sort the data in your sheet in the following order: 1. Location, 2. Barcode. If you are a single library you may leave out the sort by Location and simply sort by Barcode. However, if you are a consortium in Verso, you must FIRST sort by Location to keep your libraries holdings grouped together.

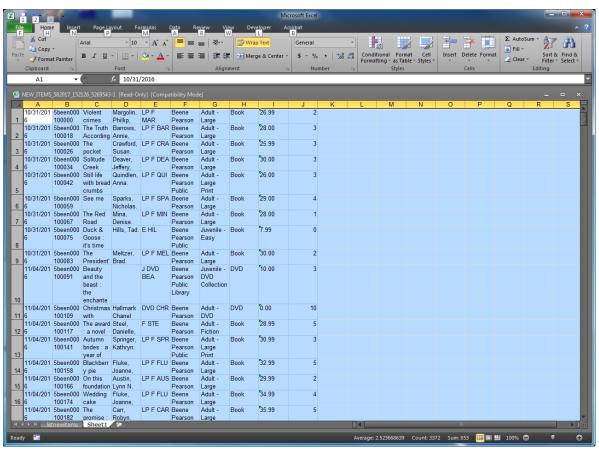
Note the "Add Level Button at top left of Sort box



4. Use Ctrl-F to Find your Regional barcodes. Think of you library's barcode numbering scheme as it is different for each library. If 5 denotes a regionally owned item, try entering the first few numbers. If you are a consortium, enter the first few numbers/letters you use in your barcodes. Press "Find Next." This should bring you to the first cell separating your locally owned barcodes from your regionally owned barcodes.

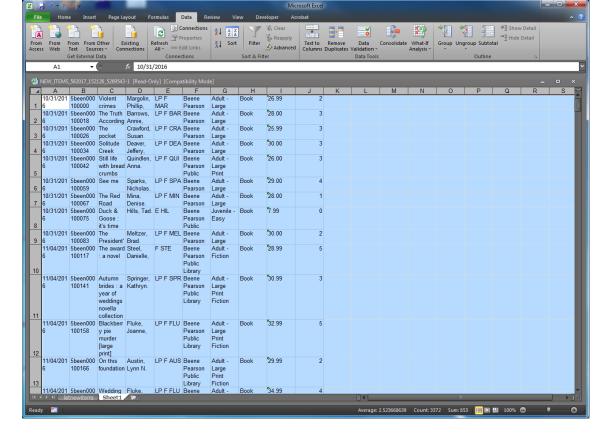


- 5. Beginning with this first line of regionally owned barcodes, click to highlight and drag all the way to the end of the sheet. Then, use the Cut function at the top left of the Ribbon.
- 6. At the bottom of your screen click the new sheet icon to open a new sheet. This looks like a sheet of paper with an orange sunburst and is located next to the name of your open sheet.

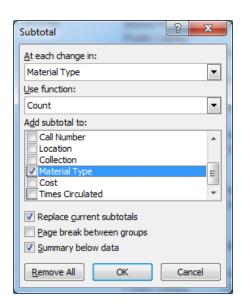


Note that there are now 2 sheets--one named "listnewitems" and and called "Sheet 1"

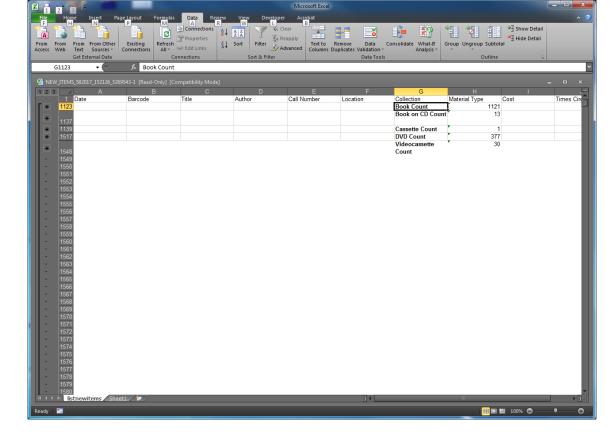
- 7. With the first cell highlighted, Paste your cut portion into the new sheet using the Paste button at the left top of the Ribbon.
- 8. Go back to your first sheet "listnewitems" and click anywhere in the sheet to deselect.
- 9. Highlight Column H Material Type and click Sort and Filter
- 10. Filter the Selection A-Z by clicking on the arrow next to Material Type in the column.
- 11. Now, at the top right corner in between Column A and Row 1, click the downward facing triangle to select the full page.
- 12. At the top of the Ribbon, choose the Data Tab.



- 13. To the right on the Ribbon, choose the "Subtotal" button
- 14. In the Subtotal Dialogue box do the following and then click OK:



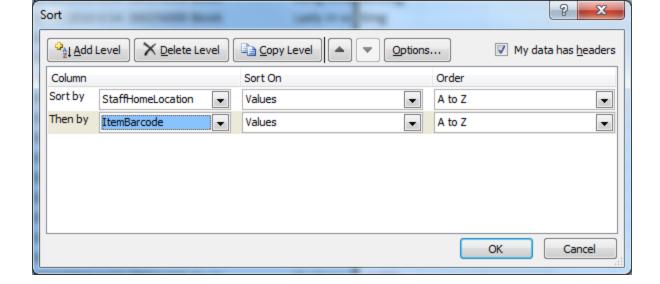
15. Now to the far left of your sheet you will see grayed columns numbered 1, 2 3. Choose Column 2.



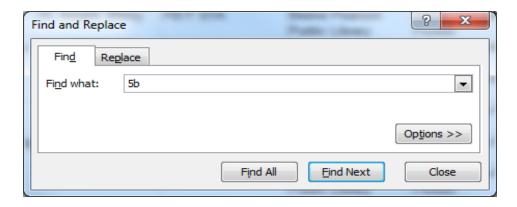
- 16. Choosing Column 2 on the far left shows you a breakdown of the count for each material type under your locally owned barcodes.
- 17. Now, click on the Sheet 1 you previously created to separate your regionally owned barcodes and follow Steps 9-16 to get the same count for your regionally owned items. In order to properly sort the data on this new sheet, you will need to copy and paste the column headings from the first sheet. If you skip this step, Excel will not know how to sort, filter or group your data for subtotaling.

#### Working with the Delete Item Report in Excel

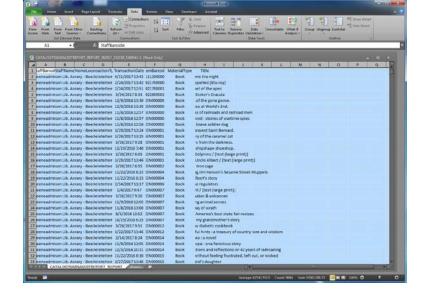
- 1. Once your report is open in Excel, you will need to sort the data to determine by barcode the number of items deleted regionally and locally. You will also need this information filtered to determine the number deleted by Material Type.
- 2. The steps for this procedure are essentially the same as for the New Item Activity Report shown above.
- 3. At the top right of the Ribbon, use the Sort and Filter button. Choose Custom Sort. Sort the data in your sheet in the following order: 1. StaffHomeLocation, 2. ItemBarcode. If you are a single library you may leave out the sort by Location and simply sort by Barcode. However, if you are a consortium in Verso, you must FIRST sort by Location to keep your libraries holdings grouped together.



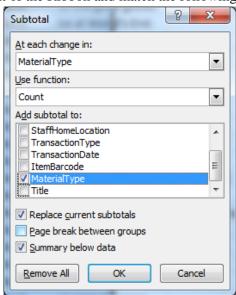
4. Use Ctrl-F to Find your Regional barcodes. Think of you library's barcode numbering scheme as it is different for each library. If 5 denotes a regionally owned item, try entering the first few numbers. If you are a consortium, enter the first few numbers/letters you use in your barcodes. Press "Find Next." This should bring you to the first cell separating your locally owned barcodes from your regionally owned barcodes.



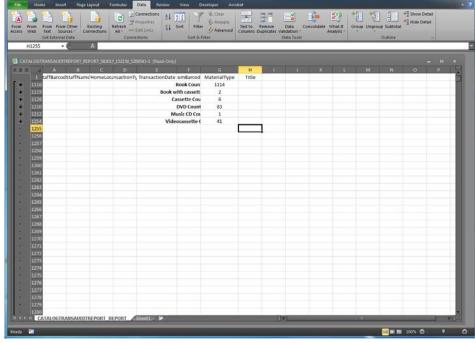
- 5. Beginning with this first line of regionally owned barcodes, click to highlight and drag all the way to the end of the sheet. Then, use the Cut function at the top left of the Ribbon.
- 6. At the bottom of your screen click the new sheet icon to open a new sheet. This looks like a sheet of paper with an orange sunburst and is located next to the name of your open sheet.
- 7. With the first cell highlighted, Paste your cut portion into the new sheet using the Paste button at the left top of the Ribbon.
- 8. Go back to your first sheet "CATALOGTRANSAUDITREPORT REPORT" and click anywhere in the sheet to deselect.
- 9. Select the First Row of the sheet, right click and delete Row 1. This is only a title and gets in the way of the following step.
- 10. Highlight Column H Material Type and click Sort and Filter
- 11. Filter the Selection A-Z by clicking on the arrow next to Material Type in the column. If asked, choose not to expand the section--only sort the selection.
- 12. Now, at the top right corner in between Column A and Row 1, click the downward facing triangle to select the full page.
- 13. At the top of the Ribbon, choose the Data Tab.



14. Click Subtotal at the top right of the Ribbon and match the following and click OK:



15. Now to the far left of your sheet you will see grayed columns numbered 1, 2 3. Choose Column 2.



- 17. Choosing Column 2 on the far left shows you a breakdown of the count for each material type under your locally owned barcodes.
- 18. Now, click on the Sheet 1 you previously created to separate your regionally owned barcodes and follow Steps 9-16 to get the same count for your regionally owned items. In order to properly sort the data on this new sheet, you will need to copy and paste the column headings from the first sheet. If you skip this step, Excel will not know how to sort, filter or group your data for subtotaling.

#### **Working with the Statistics > Patron Statistics > Patron Category in Excel**

Before running this report, run Expired Patrons Maintenance report and delete expired patrons based on your library's policy. If your library does not have a policy, 3 years is the recommended expiration date. See the Verso Patron Report handout for details on running this report.

After running the Statistics > Patron Statistics > Patron Category report, open it in Excel. Add up all the totals for the adult categories and then for the juvenile categories, making sure every category is counted in one of the two totals for your library.

Ideally, each library should have just two categories -- adult and juvenile. Then make as many Groups as you wish for your needs. But many libraries have lots of categories, so just decide which ones are adult and which are juvenile for this statistic. Note those with 'not defined' as the home location and fix those.

Working with Circ Activity by Item Location report in Excel

Arany ID Stome	Sem Location	Checkout	Resease	Checkee	Shelved	Total
Location						
FOORE SHIPMAN CODE						
and define						
	Tour Public Library					
	Critical's Section - Energy					4
Subnotal						
First Like	ary in Coemprison					
	First Library in Consentium					
	Add - Auditoria	57	- 15	48		121
	AAA : DVS Colembe	571	- 66	974		496
	Adult - Pallon	326	145	349	44	636
	Adult - Large Proti Fiction	67	13	75	2	157
	Adult - Large Proti Non-Pictors 300-300	0	2	1.2		
	Adult - Non-Pictor DG-1000	87	63	97		256
	Juvenie - Audioleolie	4	2			
	Juvenie - Flotien	. 30	57	74		266
	Juvenie - DVD Colember	. 50	13	60		134
	June No. Pales 955 898	1111	59	140	12	563
	Young-Adul - Feder	. 18	- 22	75		198
	Second Library in Consortium					
	Adult - Potteri		- 27			37
	Automite - Patient	0	22		0	22
	Jacobille - Rein-Publish	. 0	29:			28
	Media Section - DVD Collection		18			18
	Third Library in Controllarie					
	Add - Suttiments	0	9		0	
	AME-Poten	. 0	14			14
	Young Adul - Falten	. 0	1.	100.00	0	
Subnotal		1961	747	1682	. 65	4191
- Second L	brary in Consumbure					
	First Library in Consortium					
	A&A - DVG Collection		12		6	45
	Adult - Pattern		29	- 4	. 4	39
	Adult - Non-Poline 200-200		160		0	. 12
	Javanile - Platiers	. 0			. 0	
	Juvenile - Non-Politics 900-999		3			
	Young haluf - Folion		4		4	- 4
	Second Library in Consorthum					
	Adult - Patters	436	167	420	400	1496
	Adult - Carge Prot Fotion	149	46	959	nie	514
	Adult - Nove-Proteon	190	79	9377	246	745
	Charles Same Little College	34	11	22	36	6196

Circ Activity	by Item Location Report	March 20	17 = or
	Your Public Library		
	The second secon		
Library & Home	Nem Location	Checkout	Asternal
Location			
YOURLESSARYCODE			
not define			
	Your Public Library		
	Chipper's Section - Sasy -	0	
Subsoul			
first Like	ery at Comsorthym		
	First Library in Consortium		
	Adult - Hudistoorke	12	- 11
	Aust-DVD-Dateston	171	1.0
	Adult - Foton	324	140
	Adult - Cargo Pred Parties	67	13
	Add - Large Prof Son Pulser 200-200		
	Adult - Non-Police 200-990	97	53
	Juvenile - Budistinske	4	
	Javenie - Palled	90	37
	Avenir - OVO Colembia	56	13
	Juvenile - Non-Ficher 500-500	1950	50
	Young mout - Patien	58	- 22
	Sprond Library in Consentum		72
	Add - Folian		27
	Javenn - Falton	0.	72
	Josephin - State Publish		26
	Media Section / DVC Complies		19
	There's always in Consortium		
	Add - hydrones	0	
	Adult - Patton		14
	Young made - Pattern		1
Subtotal		1003	747
	Brary in Consortium	1000	
-	First Library in Compositions		
	AME-DVD-Drienton		12
	Add - Total		30
	Adult - Non-Pulsier 200-990	1	10
	Javenie - Polium		7
	Javenie - Non-Peter (co. 600		9
	Trang milet - Patien		
	Second Library in Consultium		100
	Add - Feller	436	147
	Adult - Large Prot Fators -	340	45
	and the Poles	190	10
	Children's Section - Duff Commission	30	- 11
F.F. DisAttivityby	Street or 1975		

Note any "not defined" items that need to be fixed at another time.

Highlight The Checkin, Shelved, and Total columns and DELETE them using the DELETE icon in the "Cells" box on the Ribbon.. We only count Checkouts and Renewals for the Annual Circulation Statistics. Add all the Adult items, then all the Juvenile items, making sure everything is counted in one of these two categories.

If you are in a VERSO consortium of independent libraries, count all the items under your subtotal no matter what the Item Location says -- this circulation activity happened at your library.

Include all formats - physcial + READS + other electronic items that must be returned. DO NOT include electronic resources that patrons keep (i.e. TEL). Put those numbers in 8.10.

READS stats are available in the Data Collection LibGuide, at tsla.libguides.com/datacollection.

#### **Expired Patrons**

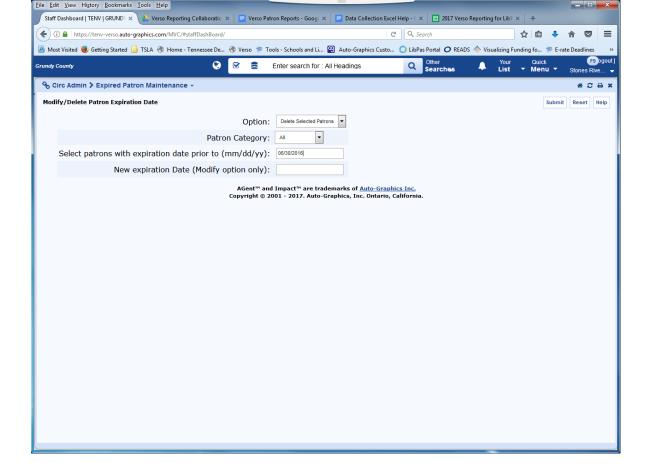
To see a list of expired patrons, follow these steps.

Circ Reports→Run Reports→under Patron Reports, choose Cateogory→Set Cutoff Date

Note: Each library sets its own policy for cutoff dates. IF your library does not have a preexisting policy on patron expiration, 3 years is the default in Verso. When purging your patron system of expired accounts, your library administration should make a decision on how recent of an expiration you are willing to delete.

To change the expiration dates or delete expired patrons in large batches:

Circ Admin→Expired Patron Maintenance→From the Drop Down, choose whether you are deleting patrons or creating new expiration dates. Then, choose your parameter dates and which Patron Categories you would like to modify or delete.

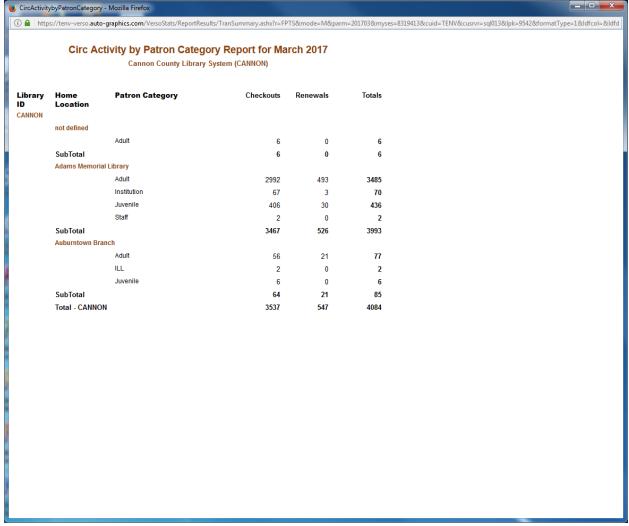


#### **Patrons with No Defined Home Location**

When encountering statistics and reports that show a top section of "Not Defined," attempts should be made to locate these patron files and correct them by editing their account.

# For a list of Non-Defined Patrons:

Circ Reports→Run Reports→Patron Listing (run this report in Excel).



Note the Not Define Patron Home Location

### In Excel:

Scroll to the far right, in the very last column gives Home Location. It may be helpful to delete the columns between the address and the Home Location to better fit the data on your screen.

Highlight the Home Location column, in the top right of the Excel Ribbon, choose Sort and Filter and place a filter on this column. Click the drop down arrow on the filter and choose only Not Assigned. This filter out all other patrons except those with no Home Location defined.

You will have to edit each patron individually in order to change their Home Location.

When running Circulation Reports, if you see a list of Not defined at the top of the report, it can also be that a staff member's account has no defined Home Location. Until you update the staff person's account, each circulation transaction he or she conducts will report under Not Defined.

nups://tenv-ve	:iso. <b>auto-grapnics.com</b> / versostats/ Reporti	results/ Fransum	mary.asnx:f=F	iL30tmode=IVIC	xpaim=20170300	1135c2=03124120	&cuid=TENV&cusrvr=sql013&lpk=9542&formatType=1&ldfcol=&ldfdesc=	міркв
	Circ Activity by Item Loca	ation Rep	ort for Ma	arch 2017	,			
	Cannon County Lib							
brary ID Home	Item Location	Checkout	Renewal	Checkin	Shelved	Total		
Location ANNON								
not define	d							
not donno	Auburntown Branch							
	DVDs - DVD Collection	2	0	0	0	2		
	Fiction - Fiction	2	0	0	0	2		
	Non-Fiction - Non-Fiction Collection	1	0	0	0	1		
	Young Adult - Fiction	1	0	0	0	1		
Subtotal		6	0	0	0	6		
	emorial Library	_		_	_	•		
	Adams Memorial Library							
	Audiobook Area - Audiobooks on CD	33	7	36	5	81		
	Audiobook Area - CD	13	4	16	0	33		
	Children's Area - Board Books	17	3	15	3	38		
	Children's Room - Easy Readers	207	39	192	9	447		
	Children's Room - Fiction	139	34	132	4	309		
	Children's Room - Junior Non Fiction	45	21	40	0	106		
	Children's Room - Picture Book	8	1	11	2	22		
	CIRCULATION - Reserves Shelf	93	0	88	18	199		
	Computer Lab - Public Access Computer	630	0	634	50	1314		
	DVDs - DVD Collection	1347	216	1366	82	3011		
	Fiction - Amish Fiction	81	10	51	14	156		
	Fiction - Christian Fiction	36	1	36	1	74		
	Fiction - Fiction	324	66	292	24	706		
	Fiction - ILL Collection	19	3	17	4	43		
	Fiction - Western Fiction	23	0	20	0	43		
	Large Print Area - Large Print	119	38	110	1	268		
	Magazine - Periodicals	12	0	17	0	29		
	Non-Fiction - Biography	17	3	14	0	34		
	Non-Fiction - Non-Fiction Collection	245	59	212	14	530		
	Non-Fiction - True Crime	6	0	8	0	14		
	Paperback Area - Children's Paperbacks	3	0	3	0	6		
	Paperback Area - Paperbacks	1	1	1	0	3		
	Young Adult - Fiction	38	12	39	5	94		

Note the Not Defined header.